U.S. Department of Agriculture • Foreign Agricultural Service • Washington, D.C.

foreign agriculture circular

coffee

Approved by the World Food and Agricultural Outlook and Situation Board • USDA

FCOF 3-79
July 1979

WORLD COFFEE CROP IN 1979/80 ESTIMATED AT 78 MILLION BAGS

SUMMARY

The first USDA estimate of the 1979/80 world coffee crop is for a total production of 78.3 million bags (60 kilograms each), 3 million bags larger than the 1978/79 outturn. Based on past performance, the chances are two out of three that the first estimate of total production will not vary by more than 3.5 percent from the final outturn for the year.

Exportable production, which represents total harvested production less domestic consumption in producing countries, is estimated at 58.3 million bags, or 4 percent more than the estimate of 56.1 million bags for 1978/79.

In North America, crops in the Dominican Republic, Guatemala, Haiti, and Nicaragua are expected to be significantly larger than in 1978/79—mainly because of favorable growing conditions—more than offsetting a smaller estimate for Costa Rica.

South America's production is estimated 7 percent higher in 1979/80. Brazil's crop is estimated at 22.5 million bags, up 2.5 million bags from the 1978/79 outturn. This represents the midpoint of the estimates for principal producing states, as follows (in million bags): Parana, 3-3.3; Sao Paulo, 8.5-9; Minas Gerais, 7.3-7.7; and other states, 3.1 Unusually early cold weather during May 30-June 1 in Brazil's coffee areas caused significant damage to coffee trees and reduced the crop outlook for 1980/81. However, damage to the 1979/80 outturn currently being harvested is considered to be relatively minor. A somewhat larger crop also is expected in Colombia. Ecuador's production is expected to be down as a result of insect damage and lack of adequate rainfall.

Africa's total crop is expected to be only slightly lower than in 1978/79, as estimated decreases for Ivory Coast and Cameroon are largely offset by a more favorable outlook for Angola, Madagascar, Tanzania, and Uganda.

Production in Asia and Oceania in 1979/80 is estimated at 6.6 million bags, about the same as in 1978/79, with only minor changes in estimates for individual producing countries.

Production

North America

North America's 1979/80 coffee crop is preliminarily estimated at 15.8 million bags, or 4 percent larger than the 1978/79 outturn. Exportable production is estimated at 11.9 million bags compared with 11.4 million for 1978/79. Crops in the Dominican Republic, Guatemala, Haiti, and Nicaragua are expected to be up significantly and this will more than offset a smaller crop foreseen for Costa Rica. Initial estimates for the 1979/80 harvests in El Salvador and Mexico—two of the larger producers in the area—are the same as current estimates for the preceding crop year.

Costa Rica's 1979/80 coffee production is estimated at 1.58 million bags, down from the record crop of 1.76 million bags in 1978/79. Although weather conditions have been generally good, it is not considered likely at this time that production will show an increase for the fourth straight year. Also, higher labor costs are expected to reduce producer incentives somewhat.

A combination of favorable factors—good weather conditions, ample fertilizer applications, and lack of disease or insect problems—resulted in the record 1978/79 outturn. Arrival of the rainy season in April this year was earlier than usual, which should be helpful to the coming crop. Also, while the area in coffee was not expanded significantly, old tracts were replanted with the higher yielding varieties.

Export contracts of the 1978/79 crop coffee through mid-April were reported at 1.17 million bags with a value of $180.2 million. Based on these sales, the average export value was $2.56 per kilogram, or $1.16 per pound. Compared with a like period of 1977/78, the volume was up 32 percent while the total value was down 10 percent. For the October-September 1978/79 coffee marketing year, exports are forecast at about 1.6 million bags, including the green-bean equivalent (GBE) of about 40,000 bags of roasted coffee. This compares with total 1977/78 exports of 1.3 million bags.

Production in **El Salvador** in 1979/80 is estimated at a conservative 3 million bags, unchanged from the current estimate for 1978/79. Were it not for the down year in the production cycle, output this year probably would be estimated at a record high. Rainfall into early May was nearly optimum and other growing conditions have been good. Coffee groves throughout the country as of the first of May were either in full bloom or had just finished blooming, and there were no reports of bloom drop resulting from lack of ground moisture. With continued favorable growing conditions, the crop could well be larger than the current estimate. The area in coffee for 1978/79 is estimated at 149,250 planted hectares, with 147,000 hectares harvested.

Official information is not readily available, but the trade expects 1978/79 exports to be around 3 million bags. Depending on market demand, exports in 1979/80 could also be 3 million bags, with some further drawdown of stocks.

Guatemala's 1979/80 crop is estimated at 2.7 million bags, or 200,000 bags more than in the 1978/79 outturn. Flowering and berry formation have been considered quite good, and improvements in cultural practices are expected to result in somewhat better yields.

Total exports in 1978/79, based on shipments through February, are placed at 2.23 million bags. According to preliminary data, calendar 1978 exports were valued at $472 million, compared with $542 million in 1977. Based on this figure, coffee sales represented 41 percent of total 1978 earnings of $1,157 million. As of early May 1979, green coffee was being sold at an f.o.b. price of about $3.20 per kilogram ($1.45 per lb), including an export tax of $45.82 per 100 pounds. On this basis, producer prices would be approximately $93 per 100 pounds of green coffee, or $73.75 for parchment. Local retail prices for roasted ground coffee ranges from $1.54 per kilogram (70 cents a pound) for seconds, to $3.30 per kilogram ($1.50 per lb) for export—quality coffee.

ANACAFE continues with its coffee diversification program. Cardamom and macadamia are the main crops being pushed, along with African palm and citrus. There is also an effort to encourage livestock production, mostly dairy.

Haiti's 1979/80 production is estimated at 550,000 bags, up 25 percent from the 1978/79 outturn. Abnormally heavy rains during the critical flowering period were the cause for unusually high flower loss in 1978/79 resulting in yields falling below even average levels.

Coffee remains Haiti's most valuable export crop. Reportedly, coffee usually generates about 80 percent of the country's agricultural exports as well as about 40 percent of total export revenues. In fiscal 1977 and 1978, Haiti earned $64.8 million and $61.4 million, respectively, from the sale of coffee beans.

Available information indicates coffee is grown on roughly 140,000 hectares (about 16 percent of total cultivated area). It is cultivated at elevations ranging from 200 to 1,200 meters, with the average about 1,000 meters. Yields vary widely as the trees must depend on rainfall for practically all moisture requirements. Haitian coffee yields are probably among the lowest in the world. In 1976, a study found average annual yields in the 230-to-270 kilograms-per-hectare range, or about 4 bags. One of the reasons given for the low yields is the excessive number of trees per hectare. Reportedly, plants sprouting from fallen seeds are allowed to grow. As a result, they become overcrowded, spindly, and produce very little coffee.

For 1979/80, **Honduras'** coffee crop is estimated at 1.15 million bags, or 50,000 bags more than in the previous season. The Coffee Institute (IHCAFE) continues its programs of assisting coffee producers through technical assistance and credit, and has been building roads to help farmers move their coffee more easily to central markets. Reduced illegal coffee shipments to Nicaragua reportedly have resulted in greater availability of coffee for the local trade.

Coffee registered for export with IHCAFE for the 1978/79 season through mid-April totaled 781,000 bags, with actual shipments amounting to 725,000 bags. It is believed that total exports for the October-September marketing year could reach 1 million bags, against exports of 938,961 bags in 1977/78.

Coffee production in **Mexico** in 1979/80 is expected at 3.8 million bags, or about the same as in 1978/79. Weather conditions during the rainy season, which normally starts in late May and extends through early October, will be critical in determining final crop size. The area planted to coffee is currently estimated at about 356,000 hectares, with the area harvested at 320,000 hectares. Total tree population is placed at 450 million, of which about 50 million are nonbearing.

Exports of all coffee in 1978/79 could reach 2.3 million bags, green-bean equivalent, which would be well above 1978/79 shipments of 1.74 million. Domestic consumption in 1978/79 is estimated at 1.6 million bags, up from 1.44 million bags for the year ending September 30, 1978.

Coffee production in **Nicaragua** for 1979/80 is estimated at 1.15 million bags, or 7 percent more than the 1978/79 crop. The favorable outlook is based on excellent flowering and good rainfall, as well as young plantings coming into production. In 1978/79, the total area planted to coffee was 107,000 hectares, with 94,500 hectares harvested.

Civil disturbances had only minor impact on the coffee industry until recently. Accordingly, the coffee harvest for 1978/79 was completed without major disruptions. One exception was the virtual destruction (by fire) of the offices of the Coffee Institute (INCAFE) in February 1979. This did not affect export activity, but it did disrupt the record-keeping process, including some details of exports. Based on preliminary data through April, however, 1978/79 exports are expected to reach 1.2 million bags, including about 15,000 bags (GBE) of soluble coffee.

South America

The first estimate of the 1979/80 coffee production for South America is 37.7 million bags, up from 35.2 million bags in 1978/79. The increase of 2.5 million bags is the same

as that for Brazil, where the 1979/80 crop is estimated at 22.5 million bags. The May 30-June 1 frost caused some damage to coffee trees and will reduce the 1980/81 prospects, accordingly. Colombia's crops for recent years have been revised upward, but expected gains in 1979/80 are likely to be offset by lower crops in Ecuador and Peru. Exportable production in South America is estimated at 26.1 million bags, up from 24.2 million in 1978/79.

Colombia's 1979/80 coffee crop, based on early indications and continued favorable growing conditions, is estimated at 11.5 million bags. This compares with revised estimates for 1978/79 and 1977/78 of 11.3 million and 11 million bags, respectively. More complete information as to yearend stock levels, exports, and new plantings coming into production are major factors in the revisions that were made. In addition, Colombian coffee trees had the potential for rather marked upward increases in yields from increased fertilizer applications and rehabilitation of existing areas as a result of sharply higher prices following the greatly reduced supplies from Brazil because of the 1975 frost.

Exports of coffee from Colombia during the first half of the 1978/79 marketing year (Oct. 1-Mar. 31) reached 6.1 million bags, or double the shipments in the corresponding period a year earlier. Shipments to the United States during this period totaled almost 2.1 million bags, compared with 908,941 in October-March 1977/78. Exports to Europe totaled 3.5 million bags, up almost 1.5 million bags from the year-earlier total. Because of the increased volume, Columbia's foreign-exchange earnings during October-March 1978/79 reached $1.16 billion, compared with $780 million in the first 6 months of 1977/78. Official exports of coffee during all of 1977/78 were reported at 7.56 million bags, and are likely to reach 9 million bags for 1978/79 marketing year. In addition, yearly contraband coffee shipments from Colombia, not included in the above figures, have been estimated at more than 600,000 bags.

On May 4, Colombia's Minister of Finance announced that the national coffee committee had approved the folowing measures:

1. Raised from 6,400 to 6,600 pesos (US$151 to $155) the official price paid to Colombian coffee growers for 125 kilograms of parchment coffee; 2. Raised the coffee retention rate from 45 to 55 percent (the retention rate requires private exporters to deposit this percentage of coffee in kind or cash with FEDECAFE for each bag of coffee exported); and 3. increased the coffee reintegro (the amount of dollars the exporter must surrender to the Banco de la Republica for each bag exported) from US$202 to US$216 per 70 kilogram-bag.

With reports of a significant frost in Brazil during May 30-June 1, Colombia temporarily suspended sales, and then began raising its minimum export price in accordance with apparent market demand and price movements.

Brazil's 1979/80 coffee production (1979 crop) is estimated at 22.5 million bags, up 2.5 million bags from the 1978/79 outturn. Exportable production in 1979/80 is estimated at 14 million bags, compared with 12 million bags in 1978/79.

Based largely on field observations of berry load and general tree conditions during an April 24-May 3 survey, the breakdown of the 1979/80 crop estimate, by principal producing states, is as follows:

State	*Million bags*
Parana	3.0-3.3
Sao Paulo	8.5-9.0
Minas Gerais	7.3-7.7
Other states	3.1
Total	21.9-23.1

The midpoint of the foregoing range was taken as the first estimate of the 1979/80 coffee crop. The survey served to confirm or modify findings made during previous surveys in August and December 1978 as to the size of the 1979 crop and to evaluate prospects for Brazil's 1980 production (1980/81 crop year.)

Although it was too early to forecast accurately the volume of the 1980 crop, tree conditions in April/May, especially vegetative growth, provided a fairly reliable indication as to the production potential for the 1980 harvest. Providing there had been continued favorable weather conditions with no significant frost during the winter months and given normal management practices, it was likely that coffee output during the 1980/81 crop year would have fallen within a range of 26-28.5 million bags.

Brazil's total area planted to coffee in 1978/79 was placed at 2.87 million hectares, with 2.23 million harvested. The total tree population was reported at 3.35 billion, with 2.4 billion bearing trees and 933 million not yet bearing. Some of these latter trees would be producing in 1979/80, and additional ones would start to bear the following crop year.

All coffee areas in the three main producing states of Parana, Sao Paulo, and Minas Gerais have had adequate and well-distributed rains since last December. Based on the April/May survey trip, the following additional observations can be made as to the 1979/80 crop:

In Parana, coffee trees east of Londrina were not affected by the 1978 frost, and were bearing above-average berry loads. Trees in the general area between Londrina and Maringa were bearing a below-average crop, while trees west of Maringa were not bearing any coffee at all.

Coffee trees in Sao Paulo showed relatively little evidence of the 1978 frost. The good load of berries on most trees indicated that any frost effect was generally superficial and that timely rains and grower management were basically adequate. With few exceptions, most coffee cherries had developed to average normal size. However, there was some evidence, on a small scale, of coffee leaf rust spores on almost all of the trees examined.

Coffee trees in Minas Gerais also were bearing a good, above-average size crop as a result of prevailing optimum weather conditions, good management practices, and high-yield varieties of young coffee trees.

Other coffee producing states that are growing in importance include Espirito Santo (the most important),

Bahia, Mato Grosso, Clara, and Gois. Coffee yields from plantings made after the 1975 frost are beginning to add to these harvests.

The cold wave that struck the coffee areas on May 30-June 1, however, has tentatively changed the 1980 crop outlook to a less favorable portential. On June 4, the Brazilian Coffee Institute temporarily suspended export sales registrations until further notice. A number of other producing countries, including Columbia, took similar actions while waiting for the situation to become more defined.

On June 5, based on its preliminary findings, the IBC announced that its previous estimate of 21.3 million bags for the 1979/80 crop would be reduced by about 9 percent while the 1980/81 crop portential of around 26 million bags would be reduced by approximately 7 million bags.

IBC has raised the value of the contribution quota on green coffee exports, both Arabica and Robusta, effective June 29, 1979, to $120 per bag for shipments made between June 29 and September 30, 1979. Also, effective June 29, sales declarations for export of green and roasted/ground coffee would be accepted by the IBC for shipments from June 29, to September 30, 1979, at US$2.00 per pound, for coffees type 6 or better.

Ecuador's 1979/80 production is estimated at 1.45 million bags, down about 10 percent from the 1978/79 harvest. Even though more coffee area will be in production, insect damage (twig borers) on Robusta plantations has been estimated at close to 30 percent. Also, drought conditions throughout the country have continued and, in addition to lowering yields, are expected to delay the harvest of Arabica coffees by about 2 months.

Indications are that approximately 254,000 hectares can presently be considered to be in coffee. Approximately 10 percent of the area has an average of 2,000 trees per hectare planted to the Caturra variety and the rest are planted on the old system, with an average of 600 trees per hectare. Thus, total tree population can be estimated at approximately 192 million.

Construction of the new soluble plant in Manta continues and it is expected to become fully operational in late 1979. Construction of two additional soluble plants is scheduled to start this year. These are to begin operating around mid-1980.

The 1979/80 **Venezuelan** crop is expected to be about 1 million bags, up modestly from the 1978/79 crop but not as large as the 1977/78 outturn. Market prices have been considered favorable, and the National Coffee Fund (NCF) will continue to supervise and manage all of the coffee operations, including marketing.

Lower output in 1978/79 is attributed to poor harvesting conditions. Some of the crop was lost because of heavy rains. Inexperienced labor also is said to have adversely affected output.

Area in production for 1978/79 is estimated at 273,500 hectares, of which perhaps 250,000 will be harvested. Ministry of Agriculture plans call for renovation of 35,000 hectares during the 1975-79 period, or about 7,000 hectares per year.

During 1978, the NCF made loans to farmers through both national and private banks in the amount of $146 million for both maintenance and the harvesting of the crop.

Africa

Africa's total coffee crop is estimated at 18.2 million bags with exportable production at 15.7 million, down slightly from corresponding figures for 1978/79. Estimates for Ivory Coast and Cameroon are down from the preceding season's levels and are not quite offset by somewhat better prospects for a number of other principal producers.

The outlook for coffee procuction in **Cameroon** in 1979/80 is for a crop of around 1.5 million bags, a decline of about 8 percent from 1978/79, mainly because of the biennial nature of the coffee plant. Also, fungus and insect infestation persists.

The area in coffee is estimated at 350,000 hectares, including 250,000 of Robusta and 100,000 of Arabica.

Provisional data for calendar 1978 show Cameroon exported 249,272 bags of Arabica coffee valued at US$59 million and 934,019 bags of Robusta coffee valued at US$165 million.

There have been no changes in Government policies toward coffee production and marketing. Programs outlined in the fourth 5-year plan (1976-81), however, are behind schedule in some instances. One such delay has been the planned soluble plant. It is now anticipated to start operation during the coming season.

Ethiopia's coffee crop in 1979/80 is estimated at 3 million bags, the same as in the preceding season. Coffee berry disease (CBD) is said to have reduced production by about 20 percent. New seedlings highly resistant to CBD are being planted in quantity this year.

Most of the coffee in Ethiopia grows wild, with individual holdings normally being 2 to 3 hectares. Producers receive the equivalent of about 65 U.S. cents a pound for regular unwashed raw coffee beans, with a 15 percent premium paid for washed coffee. Coffee for the domestic market, which takes a large percentage of the total annual outturn, is sold through the Coffee and Tea Development and Marketing Authority (CTDMA) and is mainly of the lower qualities. Total taxes on coffee are estimated to be about 50 percent of the f.o.b. price.

In 1975, a washed coffee program was begun and is still in progress, funded by the International Bank for Reconstruction and Development (IBRD) and the Dutch Government. The program includes some 300-400 kilometers of new feeder roads, plus 100 new washing stations. Another coffee improvement program was begun in 1977, and is to be of 20 years' duration. The first phase calls for $15 million, funded mainly by the European Community, and includes stumping older trees to regenerate growth and research on CBD resistant varieties.

Production in **Ivory Coast** during 1979/80 is estimated at 4.2 million bags, down from 4.5 million in 1978/79. The consensus of trade opinion is that rainfall during the February/March flowering period, critical to the 1979/80 crop, was relatively good in most of the growing area but

was less favorable in the east-central areas, where about one-fourth of the coffee is produced.

The area planted to coffee during the past 5 years has stagnated at 1.2-1.3 million hectares. Some new plantings have been made, but only enough to offset old plantations taken out of production. Reportedly, about 28 percent of the area planted in 1976/77 was in trees over 25 years old, 53 percent in trees between 14 and 25 years, and 19 percent under 15 years.

Exports of green coffee during October-September 1978/79 are projected at about 4 million bags, about the same as in 1978/79. During the first 11 months of calendar 1978, exports were valued at around $600 million, or about 28 percent of total export revenues. In 1977, coffee accounted for about 38 percent of the total value of exports. France remained the major market in 1978, with 27 percent of the total volume, followed by the United States with 18 percent.

Kenya's 1979/80 output is estimated at 1.2 million bags, slightly less than in 1978/79 and well below 1977/78 production. Weather conditions continue generally unfavorable for the upcoming crop, as they were in 1978/79, when excessive rainfall and lack of sunshine resulted in poor flowering and low yields. Also, fungicide spray residues were washed from tree leaves before adequate protection was achieved.

Exports during October-September 1978/79 are forecast at 1.3 million bags, as auction sales through May 8, 1979, were 899,096 bags. During 1977/78, problems of congestion at coffee processing centers were reduced. By the end of the season, 15 new factories were completed, bringing the total in operation to 557. A further 69 were approved for construction in 1979/80.

Liberia's 1979/80 crop is estimated at 142,000 bags, up from 133,000 bags in 1978/79. Good rains during February/March resulted in excellent flowering and good yields should result if growing conditions remain favorable. In 1978/79, area planted to coffee was estimated at 40,000 hectares, with approximately 33,000 harvested.

According to the Liberian Product Marketing Board, 1977/78 (October-September) exports reached 167,000 bags, achieved by a good crop and some drawdown in stocks. Also, some coffee from Ivory Coast is smuggled into Liberia each year as the pricing structure tends to favor this movement. In 1978/79, exports are expected to approximate production levels, with the United States again the principal market.

For the 1978/79 season, producer prices for coffee in Liberia were raised to $1.72 per kilogram (78 U.S. cents per lb), reportedly the highest in West Africa.

The 1979/80 crop in **Sierra Leone** is estimated at 166,000 bags, well below the record outturn of the previous season. It is likely that the estimate of 1978/79 production, based partly on probable exports, includes coffee smuggled from Guinea. However, growing conditions in 1978/79—and so far in 1979/80—were good, with timely rains during the flowering periods.

There are no recent figures on area planted to coffee but the 1970/71 census of agriculture reported 71,000 hectares. It is believed that coffee area has not expanded greatly since that time. However, Government programs include a 4,000-hectare expansion program for coffee and cocoa, already underway, with participation by the Ivory Coast.

Exports in 1977/78 were recorded at 115,000 bags and are projected at 172,000 bags in 1978/79 based on partial data for deliveries to the Sierra Leone Product Marketing Board (SLPMB). The United States is the main export market. China also was a major market during 1975-77—mainly barter transactions in exchange for rice and Chinese development projects.

The producer price for coffee was raised for the 1978/79 season by 8 percent to $1.63 per kilogram (74 U.S. cents per lb). Buying agents for the SLPMB receive a commission of 7.5 cents per kilogram for collecting and delivering the coffee to the Freetown warehouse.

The initial estimate for **Tanzania's** 1979/80 crop is for production of 900,000 bags, as the Arabica outturn should improve over last year's relatively poor production, especially in the Kilimanjaro area. This is where most of the Arabica coffee is produced, mainly by smallholders whose plantings average 1 to 2 hectares in size. Robusta production, which accounts for about one-fourth of total Tanzanian production, is grown in the West Lake area, also by smallholders.

The Coffee Authority of Tanzania recently carried out a tree count that indicated a total tree population of about 167 million with about 1,200 trees per hectare. The Government is trying to increase production by improving productivity through extension and research. However, the coffee export tax is relatively high, which tends to reduce grower incentive.

Production of coffee in **Uganda** in 1979/80 is optimistically estimated at 2.2 million bags, or about 10 percent more than in 1978/79, when civil unrest further disrupted an already precarious marketing and transportation infrastructure. Reportedly, more farmers during this peroid transferred their efforts from coffee culture to food crops. The Government hopes farmers will devote more time to their coffee trees again so some improvement in yields will be achieved by 1979/80. The lifting of the U.S. ban on importing coffee from Uganda—a traditional U.S. supplier of the Robusta variety—and the upturn in prices resulting from the early 1979 Brazilian frost will provide added incentive to both the Government and producers. One report of a cache of some 1.5 million bags of coffee discovered after the overthrow of the Amin Government would greatly aid the new Administration if proven to be true.

The estimate for **Zaire's** crop in 1979/80 is 1.3 million bags, the same as in the previous season. Production is largely stable, as young trees planted in 1975/76 are beginning to produce at the same time as increasing transportation and production difficulties prevent full realization of Zaire's production potential.

Since Zairianization in 1973, there has been practically no application of fertilizers and pesticides by coffee

farmers. Productivity in the estate sector is declining as a result of plant disease and impoverishment of the soil. In areas with passable roads or near the borders, smallholders reportedly have expanded their plantings, but this is in a limited number of producing areas.

Because of the war in Uganda, exports from eastern Zaire were severely curtailed and large stocks of coffee accummulated in this area. Because of inadequate storage facilities, however, it is said that some of the coffee is deteriorating.

For coffee year 1979/80, the Zairian Coffee Board (formerly the National Coffee Board) will license buyers and exporters of coffee. Applications for licenses must be submitted to the Board by July 1 and there are certain criteria required to qualify for a license.

Asia and Oceania

Total production of coffee in Asia and Oceania is estimated at 6.6 million bags in 1979/80, with very little change from the preceding year's levels for India, Indonesia, the Philippines, or Papua New Guinea. Exportable production for Asia and Oceania is estimated at 4.67 million bags, slightly below the corresponding estimate for 1978/79.

Production of coffee in **India** in 1979/80 is presently estimated at 1.84 million bags, about the same as in 1978/79. Extremely dry weather in the southern coffee growing areas since March 1979 has been an unfavorable factor in the crop outlook.

The 1978/79 crop, estimated at 1.86 million bags, includes about 1.1 million bags of Arabica coffee and 756,000 bags of Robusta. Excessive wet and cloudy weather during October-December 1978 caused some berry drop and hampered normal picking and processing operations.

As of 1976/77, area planted to coffee was 188,447 hectares, with 100,571 hectares in Arabica and 87,876 in Robusta. Estimated tree population for the same year was 373 million, with 71 percent being Arabica. Of total plantings, about 84 percent were bearing.

Exports for 1978/79 are estimated at 1.1 million bags, about 100,000 bags more than in 1977/78. Demand for Indian coffee was considered dull during the second half of 1978, but picked up considerably beginning about March of this year. Exports in 1979/80, despite an average crop, are expected to be around 1978/79 levels.

Government programs envision a doubling of production by the turn of the century, mainly through higher yields in traditional areas and extensive cultivation in nontraditional areas. More specifically, a scheme approved for the nontraditional coffee areas includes establishing demonstration farms and a training center for educating about 100 personnel at a time.

Production of coffee in **Papua New Guinea** in 1979/80 is estimated at 700,000 bags, up moderately from the 1978/79 outturn. Potential production is somewhat in excess of that figure but internal strife, including attacks on coffee buyers, is causing serious disruptions in harvesting and processing of the crop. Consequently, exports in 1979/80 are expected to be well below the 1978/79 estimate of 750,000 bags.

During July-June 1977/78, exports totaled 703,528 bags, or about 126,000 bags less than in 1976/77. West Germany, the United States, and Australia remain the major destinations.

While the Government plans further expansion in coffee production in the Highlands and in other provinces, the outlook for a substantial increase in output from new plantings—at least in the near future—is growing increasingly dim.

Other Developments

Freezing temperatures in Brazil's coffee areas during May 30-June 1 resulted in a rapid upturn in green coffee prices. On May 30, the ICO composite price of green coffee, basis 1976 ICA, was $1.47 per pound ($3.24 per kg) but by July 3 had risen to $2.08 ($4.59 per kg), or 41 percent.

On June 5, the President of the Brazilian Coffee Institute (IBC) announced that about 1.1 billion coffee trees were affected by the frost, or one-third of Brazil's total tree population of 3.3 billion. Subsequently, the IBC's preliminary field survey indicated damage to coffee trees would reduce the 1979/80 output (the current crop) by about 9 percent from the previous IBC estimate of the crop of 21.3 million bags. However, the major impact of the frost would be on the 1980/81 crop, where the prefrost potential of 26 million bags, according to the IBC, will be reduced by approximately 7 million bags.

During June 25-July 6, personnel of the Office of the U.S. Agricultural Attache in Brazil made a preliminary field survey of the frost-affected areas. Based on findings, a decrease of some 6 million bags from a potential 1980/81 Brazilian crop of 26 to 28.5 million bags is considered likely at this time. However, the size of the 1979/80 crop would not be greatly affected, although it is probable that the quality of coffee beans in a number of areas would be lowered somewhat. Regularly scheduled field trips during the next 10 months will provide a more definitive picture as to the damage caused by this frost, as well as any other factors that may affect the coffee situation.

U.S. imports of green coffee during October-April 1978/79 totaled 12 million bags, or 27 percent more than during the first 7 months of the 1977/78 coffee year. The value of green coffee imports during the corresponding 7-month periods of 1978/79 and 1977/78 were $2.1 billion and $2.2 billion, respectively.

According to the U.S. Department of Commerce, U.S. reastings of green coffee during the first quarter of calendar 1979 were 4.655 million bags, up 4 percent from the 4.467 million bags roasted during January-March 1978. Inventories of green coffee held by roasters, importers, and dealers on March 31, 1979, were 2.291 million bags, down from 2.331 million bags on December 31, 1978, but 130,000 bags higher than stocks held a year earlier.

Coffee exports by principal producing countries in 1978 totaled 56.3 million bags, up sharply from the low 1977 volume of 47.5 million, when record high prices and reduced world consumption dropped purchases by importing countries by one-fifth from the 1976 level.

Brazil continued as the leading supplier to world markets, with 22 percent of the 1978 total export volume, but its share in both 1978 and 1977 was down from 1976 and previous years. Colombia's exports at 9 million bags were more than two-thirds above 1977 shipments, and its share increased to 16 percent. Other leading exporters with more than 2 million bags in shipments in 1978 were Ivory Coast, Indonesia, El Salvador, and Guatemala. Exports by continents in 1978, as a share of total world exports, with comparable 1977 percentages in parentheses, are as follows: North America 18.9 (22.4); South America 43.4 (36.6); Africa 27.1 (30.8); and Asia and Oceania 10.6 (10.2).

With retail coffee prices in 1978 following the downward movement of world prices for green beans, U.S. per capita use began to recover from the low 9.1 pounds (GBE) for 1977 when record high prices induced substantial consumer resistance. With lower prices, per capita use in 1978 increased to 10.5 pounds, with all the increase coming in the last half of the year. This is still well below the 12.8 pound level of 1976 and that of previous years.

According to Department estimates as of April, it was considered likely that 1979 would see a per capita use of at least 10.5 pounds, and possibly higher, partly because of generally lower prices. The frost in Brazil, however, and the subsequent rise in coffee prices, may dampen the apparent upswing in coffee consumption to some extent. However, a clearer picture for the near term cannot be reached until after July/August of this year, when Brazil's frost-prone months are past.

On June 21, the 20-day average ICO composite price reached 176.31 cents per pound, exceeding the base reference price of 151.51 cents plus (or minus) 15 percent, as established by ICO Resolution 302, and requiring a meeting of the ICO Executive Board to review the market situation. Because a meeting of the Executive Board was previously sheduled for July 10/11, 1979, discussion of the market situation as called for by Resolution 302 was to be held at that time.

---

*Information in this circular was prepared by William C. Bowser, Horticultural & Tropical Products Division, CP/*FAS. Telephone: (202)447-2252.

COFFEE, GREEN: TOTAL PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1970/71-1974/75, ANNUAL 1975/76-1979/80 1/
(IN THOUSANDS OF 60 KG. BAGS) 2/

REGION AND COUNTRY	AVERAGE 1970/71-1974/75	1975/76	1976/77	1977/78	1978/79	1979/80
NORTH AMERICA:						
COSTA RICA	1,416	1,276	1,331	1,490	1,755	1,580
CUBA	472	415	450	425	450	450
DOMINICAN REPUBLIC	807	1,040	728	1,021	700	1,000
EL SALVADOR	2,549	2,530	2,968	2,400	3,000	3,000
GUATEMALA	2,187	2,043	2,613	2,350	2,500	2,700
HAITI	575	565	520	545	440	550
HONDURAS	712	636	691	1,036	1,100	1,150
JAMAICA	24	32	20	23	20	24
MEXICO	3,629	3,856	3,650	3,600	3,800	3,800
NICARAGUA	663	790	852	967	1,075	1,150
PANAMA	79	66	78	96	92	95
TRINIDAD-TOBAGO	51	42	56	44	60	50
US-HAWAII	19	11	13	14	11	12
US-PUERTO RICO	208	191	145	197	200	200
TOTAL	13,390	13,492	14,114	14,208	15,203	15,761
SOUTH AMERICA:						
BOLIVIA	91	124	113	123	130	136
BRAZIL	20,380	23,000	9,300	17,500	20,000	22,500
COLOMBIA	8,120	8,500	9,300	11,050	11,300	11,500
ECUADOR 3/	1,143	1,244	1,690	1,238	1,629	1,450
GUYANA	12	15	17	17	17	18
PARAGUAY	76	139	41	106	120	120
PERU	1,035	881	947	1,030	1,080	1,000
VENEZUELA	978	923	656	1,056	958	1,000
TOTAL	31,835	34,826	22,043	32,120	35,234	37,724
AFRICA:						
ANGOLA	3,528	1,180	1,112	1,121	900	1,000
BENIN	29	19	17	3	15	15
BURUNDI	391	279	359	285	360	350
CAMEROON	1,433	1,482	1,307	1,371	1,650	1,520
CENTRAL AFRICAN EMPIRE	185	150	166	100	150	130
CONGO, BRAZZAVILLE	13	28	33	46	40	40
EQUATORIAL GUINEA	113	90	90	80	90	100
ETHIOPIA	2,427	2,677	2,882	3,024	3,000	3,000
GABON	10	1	7	2	8	10
GHANA	59	56	70	40	70	70
GUINEA	79	23	39	25	40	30
IVORY COAST	4,280	5,266	4,867	3,320	4,500	4,170
KENYA	1,122	1,244	1,687	1,417	1,234	1,200
LIBERIA	79	88	156	137	133	142
MADAGASCAR	1,139	1,065	1,048	1,273	1,200	1,300
NIGERIA	54	67	53	46	45	45
RWANDA	324	434	531	359	400	380
SIERRA LEONE	131	64	168	72	217	166
TANZANIA	874	959	805	862	817	900
TOGO	172	151	177	82	150	120
UGANDA	3,265	2,214	2,676	2,178	2,000	2,200
ZAIRE (CONGO,K)	1,385	1,072	1,437	1,279	1,300	1,300
TOTAL	21,093	18,608	19,687	17,122	18,319	18,188
ASIA:						
INDIA	1,589	1,498	1,836	2,189	1,856	1,841
INDONESIA	2,425	3,049	2,824	3,139	3,180	3,200
MALAYSIA	65	100	100	100	100	100
PHILIPPINES	493	483	550	570	600	630
PORTUGUESE TIMOR	63	75	65	75	4/	4/
VIETNAM	55	60	60	65	70	70
YEMEN, ARAB REP.	52	45	45	50	50	50
TOTAL	4,742	5,310	5,480	6,188	5,856	5,891
OCEANIA:						
NEW CALEDONIA	27	25	25	25	25	25
PAPUA NEW GUINEA	556	634	700	617	680	700
TOTAL	583	659	725	642	705	725
WORLD TOTAL	71,644	72,896	62,070	70,280	75,317	78,289

1/ Coffee marketing year begins about July in some countries and in others about October. 2/ 132.276 pounds. 3/ As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1978 in that country is shown as production for the 1978/79 marketing year. In Ecuador, however, this is referred to as the 1977/78 crop. 4/ Beginning 1978/79 included in Indonesia.

NOTE: Production estimates for some countries include cross-border movements. Also, due to rounding, country totals may not add to area and world totals.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

July 1979

Commodity Programs, FAS, USDA

COFFEE, GREEN: EXPORTABLE PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1970/71-1974/75, ANNUAL 1975/76-1979/80 1/
(IN THOUSANDS OF 60 KG. BAGS) 2/

REGION AND COUNTRY	AVERAGE 1970/71-1974/75	1975/76	1976/77	1977/78	1978/79	1979/80
NORTH AMERICA:						
COSTA RICA	1,265	1,104	1,147	1,305	1,566	1,387
CUBA	--	--	--	--	--	--
DOMINICAN REPUBLIC	526	755	481	751	420	710
EL SALVADOR	2,382	2,350	2,783	2,210	2,805	2,800
GUATEMALA	1,924	1,753	2,315	2,046	2,189	2,385
HAITI	353	340	279	305	200	305
HONDURAS	617	532	587	929	990	1,035
JAMAICA	6	19	7	11	10	14
MEXICO	2,046	2,456	2,400	2,157	2,200	2,100
NICARAGUA	587	714	774	887	992	1,064
PANAMA	18	3	13	29	24	27
TRINIDAD-TOBAGO	39	31	41	24	38	27
US-HAWAII	--	--	--	--	--	--
US-PUERTO RICO	--	--	--	--	--	--
TOTAL	9,762	10,057	10,827	10,654	11,434	11,854
SOUTH AMERICA:						
BOLIVIA	67	95	85	92	97	101
BRAZIL	12,536	15,000	1,800	10,000	12,000	14,000
COLOMBIA	6,716	7,100	7,900	9,500	9,600	9,750
ECUADOR 3/	998	1,079	1,515	1,043	1,429	1,240
GUYANA	--	--	--	--	--	--
PARAGUAY	53	114	15	80	93	93
PERU	801	631	697	780	830	740
VENEZUELA	305	222	189	266	178	200
TOTAL	21,475	24,240	12,201	21,761	24,227	26,124
AFRICA:						
ANGOLA	3,434	1,100	248	846	820	920
BENIN	28	18	16	2	14	14
BURUNDI	389	276	357	282	357	347
CAMEROON	1,407	1,455	1,281	1,344	1,622	1,490
CENTRAL AFRICAN EMPIRE	175	139	155	88	138	116
CONGO, BRAZZAVILLE	12	27	32	45	39	39
EQUATORIAL GUINEA	103	80	80	70	80	90
ETHIOPIA	1,137	1,011	1,049	1,135	1,100	1,200
GABON	9	--	6	1	7	9
GHANA	47	41	55	25	55	56
GUINEA	75	17	33	19	34	24
IVORY COAST	3,754	5,107	4,782	3,284	4,458	4,120
KENYA	1,097	1,224	1,644	1,367	1,183	1,147
LIBERIA	73	79	146	126	122	130
MADAGASCAR	1,001	925	915	1,133	1,055	1,152
NIGERIA	5	18	--	--	--	--
RWANDA	322	432	529	357	398	378
SIERRA LEONE	126	59	163	67	212	161
TANZANIA	853	934	780	841	797	880
TOGO	171	15	176	81	149	119
UGANDA	3,243	2,192	2,646	2,148	1,970	2,170
ZAIRE (CONGO,K)	1,253	922	1,270	1,112	1,133	1,130
TOTAL	18,715	16,206	16,362	14,373	15,743	15,691
ASIA:						
INDIA	882	749	986	1,285	1,053	1,001
INDONESIA	1,488	2,033	2,010	2,620	2,670	2,650
MALAYSIA	--	--	--	--	--	--
PHILIPPINES	20	142	242	250	241	250
PORTUGUESE TIMOR	55	65	55	65	4/	4/
VIETNAM	25	30	30	30	35	35
YEMEN, ARAB REP	42	35	35	40	40	40
TOTAL	2,512	3,054	3,358	4,290	4,039	3,976
OCEANIA:						
NEW CALEDONIA	17	15	15	14	14	14
PAPUA NEW GUINEA	546	620	684	601	664	683
TOTAL	563	635	699	615	678	697
WORLD TOTAL	53,027	54,192	43,447	51,693	56,121	58,342

-- Denotes negligible, unknown, or not available.

1/ Coffee marketing year begins about July in some countries and in others about October. Exportable production represents total harvested production minus estimated domestic consumption. 2/ 132.276 pounds. 3/ As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1978 in that country is shown as production for the 1978/79 marketing year. In Ecuador, however, this is referred to as the 1977/78 crop. 4/ Beginning 1978/79 included in Indonesia.

NOTE: Production estimates for some countries include cross-border movements. Also, due to rounding, country totals may not add to area and world totals.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

July 1979 Commodity Programs, FAS, USDA

COFFEE: EXPORTS BY CONTINENTS AS PERCENTAGE OF TOTAL WORLD EXPORTS, AVERAGE 1968-72, ANNUAL 1974-78
(In percent)

Continent	Average 1968-72	1974	1975	1976	1977	1978
North America	14.7	17.8	18.2	18.7	22.4	18.9
South America	47.8	40.0	43.0	41.2	36.6	43.4
Africa	31.1	35.5	31.6	32.5	30.8	27.1
Asia and Oceania	6.4	6.7	7.2	7.6	10.2	10.6
Total	100.0	100.0	100.0	100.0	100.0	100.0

COFFEE: EXPORTS BY 12 PRINCIPAL PRODUCING COUNTRIES AS PERCENTAGE OF WORLD EXPORTS
(In percent)

Continent	Average 1968-72	1974	1975	1976	1977	1978
Angola	5.6	6.7	4.6	2.4	2.2	2.3
Brazil	32.2	24.2	25.2	26.3	21.3	22.4
Colombia	11.9	12.5	14.0	10.4	11.2	16.0
Costa Rica	2.2	2.7	2.2	1.8	2.4	2.5
El Salvador	3.3	4.4	4.1	4.3	6.4	4.2
Ethiopia	2.5	1.7	1.7	1.9	1.7	2.1
Guatemala	3.0	3.7	3.9	3.3	4.7	3.9
Indonesia	3.0	3.4	3.7	3.8	5.6	6.4
Ivory Coast	5.8	8.0	7.3	9.1	8.2	7.3
Mexico	2.8	3.5	4.0	4.6	3.9	3.5
Uganda	5.6	6.1	5.6	4.6	4.6	3.3
Zaire	1.7	2.0	1.7	3.0	2.2	2.4
Total (12 countries)	79.6	78.9	78.0	75.5	74.4	76.3

Source: Compiled by the Foreign Agricultural Service from official trade statistics of specified countries.

July 1979 Commodity Programs, FAS, USDA

GREEN COFFEE: EXPORTS BY COUNTRY OF ORIGIN, AVERAGE 1968-72, ANNUAL 1974-78
(In thousands of 60-kilogram bags) 1/

Country of origin	Average 1968-72	1974 2/	1975 2/	1976 2/	1977 2/	1978 3/
North America:						
Costa Rica	1,183	1,502	1,283	1,071	1,127	1,412
Dominican Republic	428	509	417	610	652	528
El Salvador	1,812	2,401	2,372	2,551	3,051	2,347
Guatemala	1,644	2,018	2,262	1,985	2,213	2,191
Haiti	310	306	326	421	289	257
Honduras	445	511	810	730	595	951
Mexico	1,512	1,932	2,298	2,744	1,835	1,970
Nicaragua	501	539	674	876	825	917
Trinidad and Tobago	49	13	52	30	27	27
Other 4/	124	78	46	43	36	48
Total North America	8,008	9,809	10,540	11,061	10,650	10,648
South America:						
Brazil 5/	17,586	13,279	14,604	15,602	10,126	12,644
Colombia	6,493	6,861	8,138	6,184	5,323	9,035
Ecuador	824	993	1,072	1,440	923	1,437
Peru	788	450	703	782	729	892
Venezuela	276	276	216	298	188	236
Other 4/	100	121	185	129	109	179
Total South America	26,067	21,980	24,918	24,435	17,398	24,423
Africa:						
Angola	3,033	3,690	2,665	1,395	1,039	1,297
Burundi	323	362	421	366	282	385
Cameroon	1,107	1,679	1,561	1,642	1,183	1,183
Central African Empire	158	144	233	240	150	152
Ethiopia	1,343	929	963	1,133	801	1,156
Guinea	153	17	55	17	32	11
Ivory Coast	3,186	4,392	4,234	5,380	3,886	4,091
Kenya	873	1,195	1,128	1,292	1,572	1,415
Madagascar	878	1,090	1,124	1,216	845	823
Rwanda	125	478	428	606	282	268
Tanzania	775	684	906	964	759	820
Togo	193	178	132	162	100	106
Uganda	3,042	3,358	3,217	2,724	2,200	1,878
Zaire (Congo, K)	949	1,101	982	1,784	1,069	1,364
Other 4/	859	203	290	338	461	344
Total Africa	16,997	19,500	18,339	19,259	14,661	15,293
Asia and Oceania:						
India	560	773	1,026	807	909	1,054
Indonesia	1,610	1.862	2,139	2,268	2,673	3,598
Papua New Guinea 6/	394	544	613	799	626	769
Other 4/ 7/	913	490	386	660	625	540
Total Asia and Oceania	3,477	3,669	4,164	4,534	4,833	5,961
Total	54,549	54,958	57,961	59,289	47,542	56,325

1/ 132.276 pounds each. 2/ Revised. 3/ Preliminary. 4/ Includes minor exporting countries for which data are partially estimated. 5/ Includes soluble coffee in green bean equivalent. 6/ Ending June 30 of year shown. 7/ The major portion of this total is from Singapore and represents reexports not otherwise shown.

Source: Mainly official annual trade statistics of specified countries.

GREEN COFFEE: N.Y. WHOLESALE PRICES, MEXICAN PRIME WASHED
(IN CENTS PER POUND)

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average
1967	1/	39.0	37.8	38.3	40.8	41.5	41.5	40.3	39.8	39.5	40.5	40.3	39.9
1968	40.3	40.3	40.0	40.3	40.5	40.3	40.3	40.3	39.5	39.5	39.5	39.0	40.0
1969	39.0	39.0	38.5	37.5	37.0	37.3	36.5	37.0	40.0	47.0	48.5	46.3	40.3
1970	52.5	51.3	51.8	45.8	55.5	55.0	55.5	55.0	54.0	53.0	49.0	44.5	51.9
1971	46.0	45.5	47.0	45.3	46.8	46.8	46.5	46.0	45.8	45.8	45.8	1/	46.1
1972	47.0	46.3	46.3	46.3	47.3	48.7	54.3	56.5	54.8	53.0	53.0	54.0	50.6
1973	58.0	64.0	68.0	53.5	64.0	65.0	65.5	61.0	59.8	64.3	63.4	64.1	62.5
1974	66.5	76.5	71.0	72.5	72.0	73.5	71.0	62.8	59.0	60.3	60.5	64.0	67.5
1975	58.3	58.8	50.5	48.3	47.3	54.5	52.6	86.0	79.0	80.0	77.5	80.5	64.4
1976	91.8	99.5	95.5	118.5	125.0	151.0	131.0	149.0	167.0	170.5	178.0	204.0	140.1
1977	210.0	235.0	303.0	323.0	275.0	260.0	260.0	200.0	200.0	1/	1/	1/	251.8
1978	202.5	200.0	185.0	177.5	175.0	175.0	159.0	130.0	157.0	155.0	149.0	136.0	166.8
1979	136.0	123.5	127.0	134.0	147.0								

1/ Not available.

Source: U.S. Department of Labor

July 1979 Commodity Programs, FAS, USDA

GREEN COFFEE: N.Y. WHOLESALE PRICES, COLOMBIAN MANIZALES
(IN CENTS PER POUND)

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average
1963	40.3	39.8	39.8	40.0	39.8	39.0	39.8	39.8	39.8	40.3	41.0	39.8	39.9
1964	48.0	44.8	50.5	49.0	49.8	49.3	49.5	51.5	50.3	51.0	50.3	50.5	49.5
1965	48.3	49.8	48.0	48.0	47.8	48.0	47.8	48.5	49.8	49.5	49.8	50.8	48.8
1966	49.8	50.3	49.8	49.8	49.0	48.5	48.5	48.0	46.5	45.5	46.0	44.8	48.0
1967	44.5	43.5	42.0	42.5	42.8	42.8	42.5	40.5	41.0	41.0	44.0	43.0	42.5
1968	43.3	41.3	43.3	43.5	43.0	43.0	43.8	43.5	43.0	43.8	43.8	43.0	43.2
1969	43.0	43.0	42.0	41.0	40.5	41.3	40.5	41.8	43.3	51.5	57.0	55.0	45.0
1970	60.5	58.5	57.0	58.0	58.3	58.0	57.0	57.0	56.5	57.0	54.5	53.5	57.2
1971	53.5	52.5	51.5	50.0	49.5	49.0	48.3	48.8	48.8	48.8	49.0	53.0	50.2
1972	1/	50.8	52.3	52.0	53.3	53.8	59.0	65.5	62.0	60.5	62.0	62.8	57.6
1973	66.0	74.0	75.0	68.3	74.0	76.0	76.8	74.5	74.5	73.5	73.5	72.5	73.2
1974	72.5	80.0	79.5	82.5	82.5	83.5	82.5	70.0	75.0	73.0	74.5	80.0	78.0
1975	81.0	81.5	72.3	69.8	68.3	65.8	72.0	102.0	99.0	97.0	88.5	90.0	82.3
1976	97.5	104.0	101.0	127.0	139.0	176.0	1/	1/	1/	187.0	184.0	205.0	146.7
1977	211.5	231.0	303.0	326.0	295.0	275.0	275.0	191.5	209.0	185.0	211.0	211.0	243.7
1978	200.5	195.5	186.5	180.0	185.0	193.0	186.0	182.0	185.0	180.0	173.0	172.0	184.9
1979	172.0	148.0	131.0	136.0	151.0	--	--	--	--	--	--	--	--

1/ Not available.

Source: U.S. Department of Labor
July 1979

Commodity Programs, FAS, USDA

GREEN COFFEE: ICO COMPOSITE PRICE, BASIS 1968 AGREEMENT 1/, MONTHLY AND ANNUAL AVERAGES, 1965-1979
(IN CENTS PER POUND)

Year	Jan.	Feb.	March	April	May	June	July	August	Sept.	October	Nov.	Dec.	Average
1965 2/	3/	3/	38.20	38.41	37.05	39.27	40.67	42.20	41.65	42.15	41.73	42.32	40.37
1966 2/	42.15	40.91	40.14	40.30	40.46	39.83	39.49	39.14	38.31	38.45	38.24	37.91	39.61
1967 2/	37.22	37.13	36.68	37.43	38.30	38.57	37.58	36.69	36.53	36.43	37.20	36.82	37.22
1968 2/	37.26	37.36	37.68	37.81	37.61	37.70	37.56	37.38	37.30	37.38	36.93	36.37	37.36
1969	36.33	36.54	36.05	35.17	34.96	35.35	35.42	37.01	40.28	45.33	45.83	46.22	38.71
1970	49.15	48.73	49.27	50.40	51.14	50.89	51.70	51.99	52.03	51.87	50.23	48.88	50.52
1971	49.02	46.96	45.08	44.28	44.31	43.76	43.50	43.67	43.31	43.13	43.68	45.23	44.66
1972	44.80	44.92	46.01	46.42	47.33	47.76	54.11	55.83	53.99	53.95	54.55	55.17	50.40
1973	57.04	60.75	61.77	59.78	61.63	62.78	62.85	62.33	63.07	64.05	64.82	65.09	62.16
1974	66.22	70.78	72.04	72.89	73.74	71.49	68.45	64.55	61.97	63.04	64.57	65.63	67.95
1975	64.96	63.80	60.71	59.53	60.29	63.00	60.43	4/88.49	85.80	84.59	82.73	86.84	71.76
1976	94.97	101.94	100.50	123.15	138.93	149.24	142.34	150.87	154.19	164.53	181.28	207.85	142.48
1977	227.89	251.20	324.59	333.49	295.95	269.81	246.15	240.17	236.02	221.70	228.51	201.15	256.39
1978	200.11	191.31	167.67	166.78	158.40	169.82	143.14	143.77	156.23	156.13	151.87	142.66	162.32
1979	139.42	130.61	135.55	142.60	151.31	--	--	--	--	--	--	--	--

GREEN COFFEE: ICO COMPOSITE PRICE, BASIS 1976 AGREEMENT 5/, MONTHLY AND ANNUAL AVERAGES, 1976-1979
(IN CENTS PER POUND)

Year	Jan.	Feb.	March	April	May	June	July	August	Sept.	October	Nov.	Dec.	Average
1976 6/	--	--	--	--	--	--	--	--	--	162.62	179.63	205.54	182.60
1977	217.61	254.93	304.85	314.96	277.41	243.05	209.00	201.36	195.78	172.48	182.13	185.70	229.94
1978	191.65	186.08	166.37	161.68	152.86	159.82	130.17	133.34	151.12	151.89	145.21	131.58	155.15
1979	130.93	127.76	132.76	140.22	148.74	--	--	--	--	--	--	--	--

1/ International Coffee Organization (ICO) composite price of Colombian Mild Arabica, Other Mild Arabica, Unwashed Arabica (Brazilian), and Robusta type coffees.
2/ Unofficial.
3/ Series began March 22, 1965.
4/ Average through July 1-18 only.
5/ ICO composite price of Other Mild Arabica and Robusta type coffees.
6/ Series began October 1, 1976.

Source: International Coffee Organization.

July 1979 Commodity Programs, FAS, USDA

UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C. 20250

OFFICIAL BUSINESS
PENALTY FOR PRIVATE USE, $300

If you no longer need this publication, check here ________ and return this sheet and/or envelope in which it was mailed and your name will be dropped from mailing list.

If your address should be changed ________ PRINT OR TYPE the new address, including ZIP CODE and return the whole sheet and/or envelope to:

FOREIGN AGRICULTURAL SERVICE, Room 5918 So.
U.S. Department of Agriculture
Washington, D.C. 20250

POSTAGE AND FEES PAID
U.S. DEPARTMENT OF
AGRICULTURE

U.S.MAIL

AGR 101
FIRST CLASS

4182 UNALCS A422 10C26 0001
USDA NAT AGRIC LIBRARY CURRE-
NT SERIAL RECORD AL
BELTSVILLE MD 20012